UNITED STATES PATENT AND TRADEMARK OFFICE

APPLICATION NO.	FILING DATE	FIRST NAMED INVENTOR	ATTORNEY DOCKET NO.	CONFIRMATION NO.
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HICKMAN PALERMO TRUONG & BECKER/ORACLE
2055 GATEWAY PLACE
SUITE 550
SAN JOSE, CA 95110-1083

EXAMINER
TRAN, QUOC A

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Please find below and/or attached an Office communication concerning this application or proceeding.

The time period for reply, if any, is set in the attached communication.

PTOL-90A (Rev. 04/07)

	Application No.	Applicant(s)
Office Action Summary	10/692,525	TANGEN ET AL.
	Examiner	Art Unit	
	Quoc A. Tran	2176	

-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --

Period for Reply

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE <u>3</u> MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.
- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

Status

1) ☒ Responsive to communication(s) filed on <u>28 October 2008</u>.
2a) ☐ This action is **FINAL**. 2b) ☒ This action is non-final.
3) ☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

Disposition of Claims

4) ☒ Claim(s) <u>1,3-18,20-23 and 25-42</u> is/are pending in the application.
    4a) Of the above claim(s) _____ is/are withdrawn from consideration.
5) ☐ Claim(s) _____ is/are allowed.
6) ☒ Claim(s) <u>1,3-18,20-23 and 25-42</u> is/are rejected.
7) ☐ Claim(s) _____ is/are objected to.
8) ☐ Claim(s) _____ are subject to restriction and/or election requirement.

Application Papers

9) ☐ The specification is objected to by the Examiner.
10) ☒ The drawing(s) filed on <u>28 October 2008</u> is/are: a) ☒ accepted or b) ☐ objected to by the Examiner.
    Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).
    Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).
11) ☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

Priority under 35 U.S.C. § 119

12) ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
    a) ☐ All b) ☐ Some * c) ☐ None of:
      1. ☐ Certified copies of the priority documents have been received.
      2. ☐ Certified copies of the priority documents have been received in Application No. _____.
      3. ☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).
    * See the attached detailed Office action for a list of the certified copies not received.

Attachment(s)
1) ☒ Notice of References Cited (PTO-892)
2) ☐ Notice of Draftsperson's Patent Drawing Review (PTO-948)
3) ☐ Information Disclosure Statement(s) (PTO/SB/08)
    Paper No(s)/Mail Date _____.
4) ☐ Interview Summary (PTO-413)
    Paper No(s)/Mail Date. _____.
5) ☐ Notice of Informal Patent Application
6) ☐ Other: _____.

U.S. Patent and Trademark Office
PTOL-326 (Rev. 08-06)   **Office Action Summary**   Part of Paper No./Mail Date 20081210

DETAILED ACTION

This action is a Non-Final Office Action, in response to Applicant's

RCE/Amendments/Remarks filed 10/28/2008. Claims 1, 3-18, 20-23, and 25-42 are

pending. Claims 1, 18, and 23 are independence claims. Applicants have amended

claims 1, 18, 23. Effective filing date is *10/24/2003* (Hyperion Solutions Corporation).

Continued Examination Under 37 CFR 1.114

A request for continued examination under 37 CFR 1.114, including the fee set

forth in 37 CFR 1.17(e), was filed in this application after final rejection. Since this

application is eligible for continued examination under 37 CFR 1.114, and the fee set

forth in 37 CFR 1.17(e) has been timely paid, the finality of the previous Office action

has been withdrawn pursuant to 37 CFR 1.114. Applicant's submission filed on

10/28/2008 has been entered.

Specification

The specification is objected to as failing to provide proper antecedent basis for

the claimed subject matter.

Claims 18 and 23, recite the limitation "***processors couple to a memory***".

However, there is not any support for the terms "*processors*" and/or "*memory*" in the

Applicant's disclosure. See 37 CFR 1.75(d)(1) and MPEP § 608.01(o). Correction is

required.

Claims Rejections – 35 U.S.C. 101

35 U.S.C. 101 reads as follows:

Whoever invents or discovers any new and useful process, machine, manufacture, or composition of matter, or any new and useful improvement thereof, may obtain a patent therefor, subject to the conditions and requirements of this title.

Claims 18, 20-23, 25-39, and 41-42 are rejected under 35 U.S.C. 101, because the claimed invention is directed to non-statutory subject matter.

Claims 18, 20-23, 25-39, and 41-42:

Claims 18, and 23 recites an "*apparatus comprising one or more processors coupled to a memory*" further comprising the "*means for*" for performing various functions (i.e. reading, determining...).

However, there is not any support for the terms "*processors*" and/or "*memory*" in the Applicant's disclosure; the disclosure of the present invention expressly states "an *apparatus for establishing a mapping* between internal metadata and external data in a report design environment ..." (emphasis added -- see Specification → Page 15, Para 28). Also "adding an additional *software package to generate such mappings*" (emphasis added -- see Specification → Page 3, Para 3).

Thus, for purposes of examination, the examiner interprets the recited "*means for*" for performing various functions (i.e. reading, determining...) to comprise only computer software. Accordingly, the "*apparatus*" recited in Claims 18, and 23 are software *per se.*

Computer software is not a process, a machine, a manufacture or a composition

of matter. Accordingly, Claim 17 fails to recite statutory subject matter, as defined in 35

U.S.C. 101.

Claims 20-22, 25-39, and 41-42 merely further describe the recited *"means for"*

for performing various functions (i.e. reading, determining...)" Accordingly, Claims 20-

22, 25-39, and 41-42 fail to recite statutory subject matter, as defined in 35 U.S.C. 101.

In the interest of compact prosecution, the application is further examined against

the prior art, as stated below, upon the assumption that the applicants may overcome

the above stated rejections under 35 U.S.C. 101.

Claim Rejections - 35 USC § 103

The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all

obviousness rejections set forth in this Office action:

> *(a) A patent may not be obtained though the invention is not identically disclosed or described*
> *as set forth in section 102 of this title, if the differences between the subject matter sought to*
> *be patented and the prior art are such that the subject matter as a whole would have been*
> *obvious at the time the invention was made to a person having ordinary skill in the art to which*
> *said subject matter pertains. Patentability shall not be negatived by the manner in which the*
> *invention was made.*

Claims 1, 3-18, 20-23, and 25-42 rejected under 35 U.S.C. 103(a) as being

unpatentable over **Davis** et al (US 20030041077A1, filed 01/23/2002) [hereinafter

"Davis"], in view of **Webber** (US006418400B1, filed 12/30/1998) [hereinafter "Webber"].

*Regarding **independent claim 1**,*

Davis teaches:

A method for establishing a mapping between internal metadata for a database and external metadata for a report,

(At Fig. 2-3 and at Page 5 Para [0061-0067] → Davis disclosed the internal XBRL data [e.g., Internal metadata] and report items 222-224 mapped by RDX mapper item 210 to the a web server database storage included XBRL documents item 340 [e.g. external metadata] in a computer network item 314. Also Davis further disclosed the XBRL specification generally supports two types of reporting, internal and public. RDX system 100 permits the editing of public report templates referencing the GAAP taxonomy to provide private reporting referencing private taxonomies that extend the GAAP.)

This interpretation is support by the applicant's disclosure, which is stated, "*Internal metadata is metadata that is either defined by the user of the report generator, or provided in the database associated with the database package…. in the case of Extensible Business Reporting Language (XBRL). XBRL is based on the Extensible Markup Language (XML), and…, it would be valuable to allow users to map internal metadata to XBRL external metadata.*" See applicant's Specification at Page 2 Para [0003] through Page 3 Para [0004].

the method comprising: reading, from the database, said internal metadata; wherein said internal metadata is metadata that describes data, stored in the database;

(At Fig. 2 and at Page 5 Para [0061-0067] → Davis disclosed this limitation, as clearly

indicated in the cited text, [e.g., the internal XBRL data [e.g., Internal metadata] and

report items 222-224 mapped by RDX mapper item 210 to the a web server database

storage included XBRL documents item 340 [e.g. external metadata] in a computer
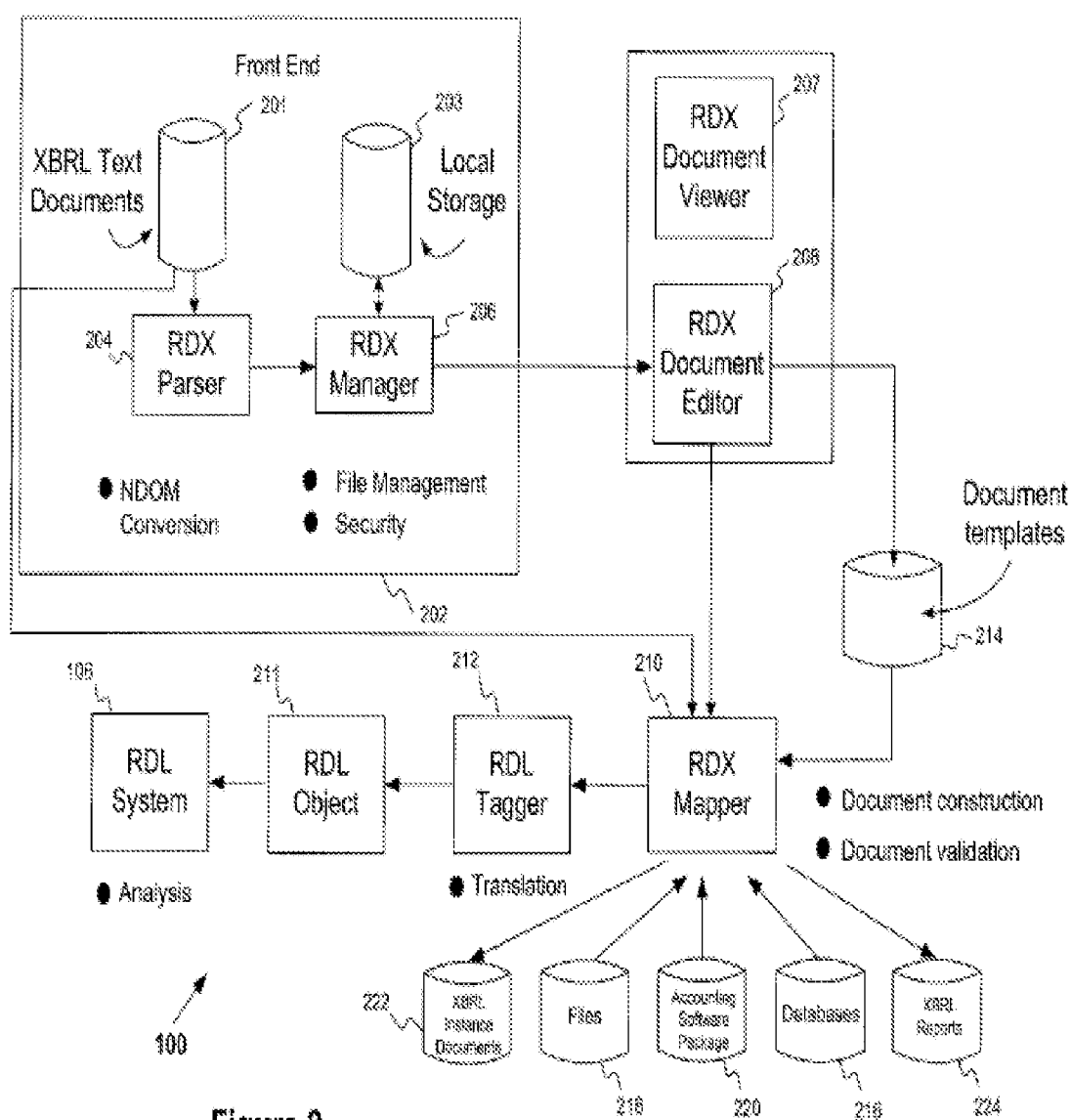
network item 31.)

Figure 2

generating and displaying a screen, wherein displaying the screen

includes displaying organizing the internal metadata, which was read from

the database, in a grid having rows and columns,

(At Fig. 2 item 207 and at Page 5 Para [0061-0067] → Davis disclosed this limitation, as

clearly indicated in the cited text [e.g., the RDX document viewer, which was read from

local storage item 203 of Fig. 2 as shown]. Also Davis further disclosed the RDL

supports translation of XBRL instance document data into RDL format for analysis in

RDL system 106. The RDL system, in turn, provides data browsing, data manipulation,

data viewing (for example, in the form of charts, spreadsheets [rows and column], etc.),

and a general user interface for RDL documents, See Davis at Para [0067].

wherein dimensional metadata from said internal metadata is placed

in the grid as row headings and/or column headings;

(At Fig. 2 and at Para [0096] → Davis disclosed this limitation, that is RDX document

editor 208 provides style sheet editing capabilities, for example, contain a set of

financial statements against which several style sheets could be applied: one to show

the data in annual columns, one to show it in a quarterly breakdown, one to show it in

European format, and so forth [e.g. the grid as row headings and/or column headings].

Also Davis further disclosed XBRL's period type [e.g. dimensional metadata, report with

four, three-month time periods (four quarters). The user may also use these parameters

to specify any duration for a period type], See Davis at Para [0116]

receiving from a user a selection of a portion of said grid, said

selection indicating one or more cells of the grid;

(At Para [0116]→ Davis disclosed this limitation, as clearly indicated in the cited text [e

XBRL's period type [e.g. dimensional metadata, report with four, three-month time

periods (four quarters). The user may also use these parameters to specify any duration

for a period type]]. of the spreadsheet [e.g. cells of the spreadsheet].)

in response to receiving from the user said selection: determining

which internal metadata, displayed on said grid, corresponds to said one or

more cells; wherein the internal metadata that corresponds to the one or

more cells is a subset of all internal metadata displayed in said grid;

(At Para [0116]→ Davis disclosed this limitation, as clearly indicated in the cited text [e

XBRL's period type [e.g. dimensional metadata, report with four, three-month time

periods (four quarters) [cell]. The user may also use these parameters to specify any

duration for a period type]]. Also Davis further disclosed a mapper for generating a

relationship between data from one or more sources and the one or more values to be

placed within the report. The mapper working in conjunction with a report template

generates the report. The template [e.g. a subset of all internal metadata] contains data

that is directly inserted into the report and instructions to enable the mapper to retrieve

data from the one or more sources for insertion into the report see Davis at Para

[0027].)

In addition Davis does not expressly teach, but Webber teaches:

presenting to the user one or more user interface controls for

receiving, from said user, a definition of external metadata in said report;

(At Fig. 3 and Fig. 5 and at Col. 4 Line 35 though Col. 9, Line 40 → Webber disclosed

this limitation, that is a spreadsheet-style user interfaces representation included GUI

based display of template mapping system comprises: Global EDI [Electronic Data

Interchanged] Dictininary [e.g. a definition of external metadata]; Mapping templates;

and The Field Name selection which is provided the end user the ability to designate

fields from a data store, such as an Oracle database in the example shown and the

Table linkage section 15 then allows the user to specify the physical table structure for
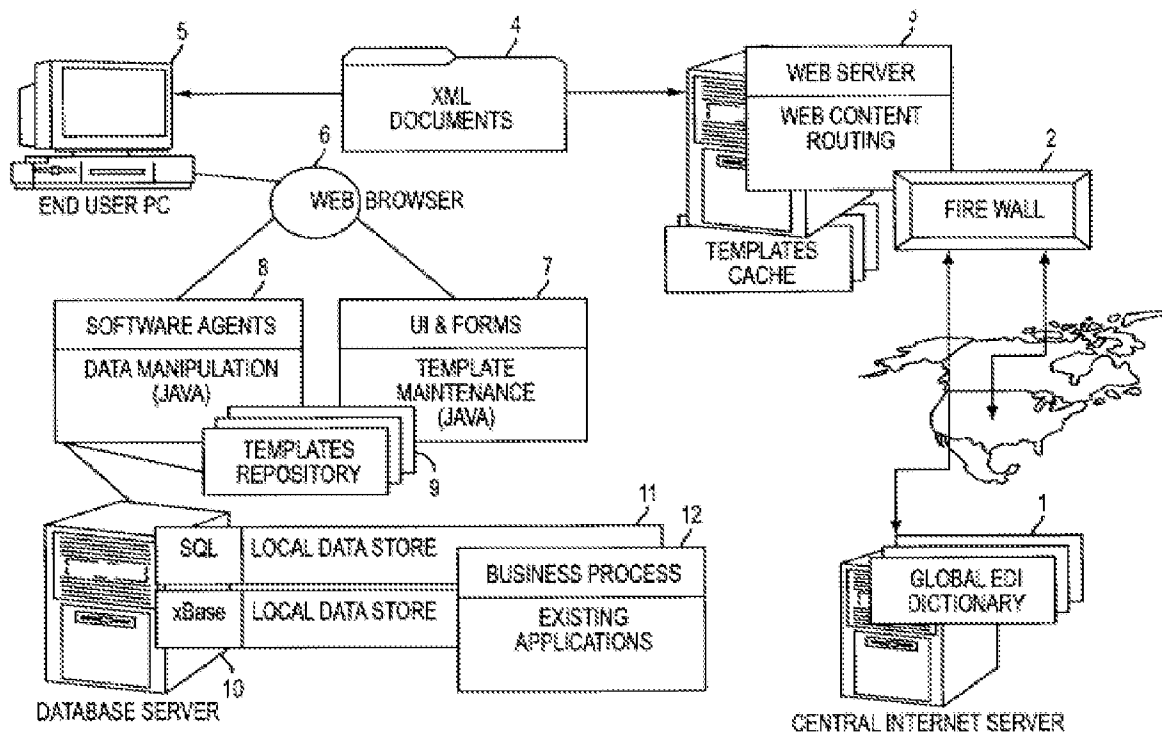
the data store selected.)

FIG. 5

wherein the external metadata is metadata that describes report data

for said report; wherein the definition of external metadata is for only said

subset of internal metadata that corresponds to cells that were selected by

said selection;

(At Fig. 3 and Fig. 5 and at Col. 4 Line 35 though Col. 9, Line 40 → Webber disclosed

this limitation, that is a spreadsheet-style user interfaces representation included GUI

based display of template mapping system comprises: Global EDI [Electronic Data

Interchanged] Dictinionary [e.g. a definition of external metadata] that describes a

spreadsheet-style data. Particularly at step 35, A through K of Col. 9 line35 → Col.11,

Line 60 of Webber. Particularly at step I, Davis disclosed the user is requested to

indicate any fields that must contain only certain discrete values from the EDI global

dictionary.).

wherein the definition of external metadata specifies particular

external metadata in said report to associate with said subset of internal

metadata;

(At Fig. 3 and Fig. 5 and at Col. 4 Line 35 though Col. 9, Line 40 → Webber disclosed

this limitation, that is a spreadsheet-style user interfaces representation included GUI

based display of template mapping system comprises: Global EDI [Electronic Data

Interchanged] Dictinionary [e.g. a definition of external metadata] that describes a

spreadsheet-style data. Particularly at step 35, A through K of Col. 9 line35 → Col.11,

Line 60 of Webber. Particularly at step I, Davis disclosed the user is requested to

indicate any fields that must contain only certain discrete values from the EDI global

dictionary.).

wherein the definition of external metadata describes all data points

within said selection; receiving, via the one or more user interface controls,

said definition of external metadata from said user; and based on the

definition of external metadata, creating a mapping between said selected

internal metadata and the particular external metadata specified by the

definition of external metadata;

(At Fig. 3 and Fig. 5 and at Col. 4 Line 35 though Col. 9, Line 40 → Webber disclosed

this limitation, that is a spreadsheet-style user interfaces representation included GUI

based display of template mapping system comprises: Global EDI [Electronic Data

Interchanged] Dictrinionary [e.g. a definition of external metadata] that describes a

spreadsheet-style data. Particularly at step 35, A through K of Col. 9 line35 → Col.11,

Line 60 of Webber. Particularly at step I, Davis disclosed the user is requested to

indicate any fields that must contain only certain discrete values from the EDI global

dictionary. Also Webber further disclosed Mapping templates; and The Field Name

selection which is provided the end user the ability to designate fields from a data store,

such as an Oracle database in the example shown and the Table linkage section 15

then allows the user to specify the physical table structure for the data store selected.)

and based at least on the mapping, generating a report definition for

said report, wherein said report definition describes how the report data

described by the external metadata in said report is to be produced from

the data stored in the database and described by said internal metadata.

(At Fig. 3 and Fig. 5 and at Col. 4 Line 35 though Col. 9, Line 40 → Webber disclosed

this limitation, that is a spreadsheet-style user interfaces representation included GUI

based display of template mapping system comprises: Global EDI [Electronic Data

Interchanged] Dictrinionary [e.g. a definition of external metadata] that describes a

spreadsheet-style data. Particularly at step 35, A through K of Col. 9 line35 → Col.11,

Line 60 of Webber. Particularly at step I, Davis disclosed the user is requested to

indicate any fields that must contain only certain discrete values from the EDI global dictionary. Also Webber further disclosed Mapping templates; and The Field Name selection which is provided the end user the ability to designate fields from a data store, such as an Oracle database in the example shown and the Table linkage section 15 then allows the user to specify the physical table structure for the data store selected.)

Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis XBRL report to include a means of said presenting to the user one or more user interface controls for receiving, from said user, a definition of external metadata in said report; wherein the external metadata is metadata that describes report data for said report; wherein the definition of external metadata is for only said subset of internal metadata that corresponds to cells that were selected by said selection; wherein the definition of external metadata specifies particular external metadata in said report to associate with said subset of internal metadata; wherein the definition of external metadata describes all data points within said selection; receiving, via the one or more user interface controls, said definition of external metadata from said user; and based on the definition of external metadata, creating a mapping between said selected internal metadata and the particular external metadata specified by the definition of external metadata; and based at least on the mapping, generating a report definition for said report, wherein said report definition describes how the report data described by the external metadata in said report is to be produced from the data stored in the database and described by said internal metadata as taught by Webber.

One of ordinary skill in the art would have been motivated to modify this combination to

archive a predictable result of advantageously provides a finer level of detail that

enables the user to enable reports to be automatically scheduled and transmitted in

XBRL format, and capable of automatically link a current accounting system to an XBRL

document to generate an XBRL report; that have an efficient and automatic means to

analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **independent claim 18**,*

      is directed to an apparatus for performing the steps of claim 1 cites above.

Thus, Davis and Webber disclose every limitation of Claim 18 and provides

proper reasons to combine, as indicated in the above rejections for Claim 1- see

Davis at Para 68, discloses various System Hardware Component.

*Regarding **independent claim 23**,*

      is directed to an apparatus for performing the steps of claim 1 cites above.

Thus, Davis and Webber disclose every limitation of Claim 23 and provides

proper reasons to combine, as indicated in the above rejections for Claim 1- see

Davis at Para 68, discloses various System Hardware Component.

Regarding **claims 3 and 25**,

Davis and Webber teach the method of claims 1 and 23 and further comprise:

determining if the external metadata describing all data points within said selection is predefined; and wherein if the external metadata describing all data points within said selection is predefined, said receiving from said user a definition of external metadata comprises: presenting said user a list from which they may select an item of predefined metadata; and receiving from said user a selection of an item of predefined metadata from said list.

(At Fig. 3 and Fig. 5 and at Col. 4 Line 35 though Col. 9, Line 40 → Webber disclosed this limitation, that is a spreadsheet-style user interfaces representation included GUI based display of template mapping system comprises: Global EDI [Electronic Data Interchanged] Dictinionary [e.g. a definition of external metadata] that describes a spreadsheet-style data. Particularly at step 35, A through K of Col. 9 line35 → Col.11, Line 60 of Webber. Particularly at step I, Davis disclosed the user is requested to indicate any fields that must contain only certain discrete values from the EDI global dictionary. Also Webber further disclosed Mapping templates; and The Field Name selection which is provided the end user the ability to designate fields from a data store, such as an Oracle database in the example shown and the Table linkage section 15 then allows the user to specify the physical table structure for the data store selected.)

Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis XBRL report to include a means of said determining if the external metadata describing all data points within said selection is predefined; and wherein if the external metadata describing all data points within said selection is predefined, said receiving from said user a definition of external metadata comprises: presenting said user a list from which they may select an item of predefined metadata; and receiving from said user a selection of an item of predefined metadata from said list as taught by Webber. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

Regarding **claims 4 and 26**,

Davis and Webber teach the method of claims 3 and 25 and further comprise:

wherein said list is provided in a tree control.

(See Davis at Para 62, discloses a NDOM form a tree structure.)

*Regarding **claim 5 and 27**,*

Davis and Webber teach the method of claims 3 and 25 and further comprise:

determining if syntax of the external metadata describing all data

points within said selection is predefined; and wherein if the external

metadata describing all data points within said selection is not predefined,

but syntax of the external metadata describing all data points within aid

selection is predefined, said receiving from said user a definition of

external metadata comprises: presenting said user with one or more dialog

boxes in which they can specify external metadata to be created; and

receiving from said user a specification of external metadata to be created.

(At Fig. 3 and Fig. 5 and at Col. 4 Line 35 though Col. 9, Line 40 → Webber disclosed

this limitation, that is a spreadsheet-style user interfaces representation included GUI

based display of template mapping system comprises: Global EDI [Electronic Data

Interchanged] Dictinionary [e.g. a definition of external metadata] that describes a

spreadsheet-style data. Particularly at step 35, A through K of Col. 9 line35 → Col.11,

Line 60 of Webber. Particularly at step I, Davis disclosed the user is requested to

indicate any fields that must contain only certain discrete values from the EDI global

dictionary. Also Webber further disclosed Mapping templates; and The Field Name

selection which is provided the end user the ability to designate fields from a data store,

such as an Oracle database in the example shown and the Table linkage section 15

then allows the user to specify the physical table structure for the data store selected.)

Accordingly, it would have been obvious to one of ordinary skill in the art at the

time of the invention to modify Davis XBRL report to include a means of said

determining if syntax of the external metadata describing all data points within said

selection is predefined; and wherein if the external metadata describing all data points

within said selection is not predefined, but syntax of the external metadata describing all

data points within aid selection is predefined, said receiving from said user a definition

of external metadata comprises: presenting said user with one or more dialog boxes in

which they can specify external metadata to be created; and receiving from said user a

specification of external metadata to be created as taught by Webber. One of ordinary

skill in the art would have been motivated to modify this combination to archive a

predictable result of advantageously provides a finer level of detail that enables the user

to enable reports to be automatically scheduled and transmitted in XBRL format, and

capable of automatically link a current accounting system to an XBRL document to

generate an XBRL report; that have an efficient and automatic means to analyze and

manipulate data in an XBRL document- See Davis at Para 24.

Regarding **claims 6-7 and 28-29**,

> are fully incorporated similar subject of claim 1 cites above, and are
>
> similarly rejected along the same rationale. Thus, Davis and Webber disclose
>
> every limitation of Claims 6-7 and 28-29 and provide proper reasons to combine,
>
> as indicated in the above rejections for Claim 1.
>
> In addition, Davis teaches:

wherein said presenting includes presenting said user with a dialog

box.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup

Language" which was previously incorporated by reference. Information about the

selected taxonomy element is displayed as a pop up window, such as document window

906.)

*Regarding **claims 8 and 30**,*

are fully incorporated similar subject of claim 1 cites above, and are

similarly rejected along the same rationale. Thus, Davis and Webber disclose

every limitation of Claims 8 and 30 and provide proper reasons to combine, as

indicated in the above rejections for Claim 1.

In addition, Davis teaches:

wherein said presenting includes presenting said user with a dialog

box.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup

Language" which was previously incorporated by reference. Information about the

selected taxonomy element is displayed as a pop up window, such as document window

906.)

Regarding **claims 9 and 31**,

are fully incorporated similar subject of claim 1 cites above, and are similarly rejected along the same rationale. Thus, Davis and Webber disclose every limitation of Claims 9 and 31 and provide proper reasons to combine, as indicated in the above rejections for Claim 1.

In addition Davis teaches:

wherein said presenting includes presenting said user with a dialog box.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.)

Regarding **claims 10 and 32**,

are fully incorporated similar subject of claims 1 and 4 cite above, and are similarly rejected along the same rationale. Thus, Davis and Webber disclose every limitation of Claims 10 and 32 and provide proper reasons to combine, as indicated in the above rejections for Claims 1 and 4.

In addition, Davis teaches:

an element button is selected and a text field when a custom button is selected.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup

Language" which was previously incorporated by reference. Information about the

selected taxonomy element is displayed as a pop up window, such as document window

906.

Regarding **claims 11 and 33**,

Davis and Webber teach the method of claims 1 and 23 and further comprise:

wherein said selection is one or more columns in said grid.

(At Fig. 2 item 207 and at Para [0067] → Davis disclosed this limitation, as clearly

indicated in the cited text [e.g., The RDL system, in turn, provides data browsing, data

manipulation, data viewing (for example, in the form of charts, spreadsheets [rows and

column], etc.), and a general user interface for RDL documents.)

Regarding **claims 12 and 34**,

Davis and Webber teach the method of claims 1 and 23 and further comprise:

wherein said selection is one or more columns in said grid.

(At Fig. 2 item 207 and at Para [0067] → Davis disclosed this limitation, as clearly

indicated in the cited text [e.g., The RDL system, in turn, provides data browsing, data

manipulation, data viewing (for example, in the form of charts, spreadsheets [rows and

column], etc.), and a general user interface for RDL documents.)

Regarding **claims 13 and 35,**

Davis and Webber teach the method of claims 1 and 23 and further comprise:

selecting individual cells in said grid.

(At Para [0116]→ Davis disclosed this limitation, as clearly indicated in the cited

text [e XBRL's period type [e.g. dimensional metadata, report with four, three-month

time periods (four quarters) [cell].)

Regarding **claims 14 and 36,**

Davis and Webber teach the method of claims 13 and 35 and further comprise:

wherein preexisting mappings for rows or columns containing said

selection are overwritten for said selected individual cells.

(At Fig. 2 and at Para [0096] → Davis disclosed this limitation, that is RDX document

editor 208 provides style sheet editing capabilities, for example, contain a set of

financial statements against which several style sheets could be applied: one to show

the data in annual columns, one to show it in a quarterly breakdown. Also Davis further

disclosed XBRL's period type [e.g. dimensional metadata, report with four, three-month

time periods (four quarters). The user may also use these parameters to specify any

duration for a period type], See Davis at Para [0116].)

Regarding **claims 15 and 37**,

Davis and Webber teach the method of claims 1 and 23 and further comprise:

receiving from said user a formula involving one or more data items in said grid; creating a new row or column in said grid; entering said formula into a cell in said new row or column; and wherein said selection includes said cell.

(At Fig. 2 and at Para [0096] → Davis disclosed this limitation, that is RDX document editor 208 provides style sheet editing capabilities, for example, contain a set of financial statements against which several style sheets could be applied: one to show the data in annual columns, one to show it in a quarterly breakdown. Also Davis further disclosed XBRL's period type [e.g. dimensional metadata, report with four, three-month time periods (four quarters). The user may also use these parameters to specify any duration for a period type], See Davis at Para [0116].)

Regarding **claims 16 and 38**,

Davis and Webber teach the method of claims 1 and 23 and further comprise:

external metadata is Extensible Business Reporting Language (XBRL) metadata;

(See Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets report.)

Regarding **claims 17 and 39,**

are fully incorporated similar subject of claim 1 cites above, and are

similarly rejected along the same rationale. Thus, Davis and Webber disclose

every limitation of Claims 17 and 39 and provide proper reasons to combine, as

indicated in the above rejections for Claim 1.

In addition, Davis teaches:

.   **schema manager**- (See Davis at Para 82, discloses XBRL Schema

management.)

Regarding **Claim 20,**

Davis and Webber teach the method of claim 18 and further comprise:

a predefined external metadata selection determiner coupled to said

external metadata user definition receiver; and wherein said external

metadata user definition receiver includes: a predefined metadata list

presenter; and a predefined metadata list item receiver coupled to said

predefined metadata list presenter.

(At Fig. 3 and Fig. 5 and at Col. 4 Line 35 though Col. 9, Line 40 → Webber disclosed

this limitation, that is a spreadsheet-style user interfaces representation included GUI

based display of template mapping system comprises: Global EDI [Electronic Data

Interchanged] Dictinionary [e.g. a definition of external metadata] that describes a

spreadsheet-style data. Particularly at step 35, A through K of Col. 9 line35 → Col.11,

Line 60 of Webber. Particularly at step I, Davis disclosed the user is requested to

indicate any fields that must contain only certain discrete values from the EDI global

dictionary. Also Webber further disclosed Mapping templates; and The Field Name

selection which is provided the end user the ability to designate fields from a data store,

such as an Oracle database in the example shown and the Table linkage section 15

then allows the user to specify the physical table structure for the data store selected.)

Accordingly, it would have been obvious to one of ordinary skill in the art at the

time of the invention to modify Davis XBRL report to include a means of said a

predefined external metadata selection determiner coupled to said external metadata

user definition receiver; and wherein said external metadata user definition receiver

includes: a predefined metadata list presenter; and a predefined metadata list item

receiver coupled to said predefined metadata list presenter as taught by Webber. One

of ordinary skill in the art would have been motivated to modify this combination to

archive a predictable result of advantageously provides a finer level of detail that

enables the user to enable reports to be automatically scheduled and transmitted in

XBRL format, and capable of automatically link a current accounting system to an XBRL

document to generate an XBRL report; that have an efficient and automatic means to

analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **Claim 21**,*

Davis and Webber teach the method of claim 20 and further comprise:

a predefined external metadata syntax determiner coupled to said

external metadata user definition receiver; and wherein said external

metadata user definition receiver includes: an external metadata dialog box

presenter; and an external metadata specification receiver coupled to said

external metadata dialog box presenter.

(At Fig. 3 and Fig. 5 and at Col. 4 Line 35 though Col. 9, Line 40 → Webber disclosed

this limitation, that is a spreadsheet-style user interfaces representation included GUI

based display of template mapping system comprises: Global EDI [Electronic Data

Interchanged] Dictinionary [e.g. a definition of external metadata] that describes a

spreadsheet-style data. Particularly at step 35, A through K of Col. 9 line35 → Col.11,

Line 60 of Webber. Particularly at step I, Davis disclosed the user is requested to

indicate any fields that must contain only certain discrete values from the EDI global

dictionary. Also Webber further disclosed Mapping templates; and the Field Name

selection 14 provides the end user the ability to designate fields from a data store, such

as an Oracle database in the example shown, or XML tag names in an XML based data

store selection which is provided the end user the ability to designate fields from a data

store, such as an Oracle database in the example shown and the Table linkage section

15.)

Accordingly, it would have been obvious to one of ordinary skill in the art at the

time of the invention to modify Davis XBRL report to include a means of said a

predefined external metadata syntax determiner coupled to said external metadata user

definition receiver; and wherein said external metadata user definition receiver includes:

an external metadata dialog box presenter; and an external metadata specification

receiver coupled to said external metadata dialog box presenter as taught by Webber.

One of ordinary skill in the art would have been motivated to modify this combination to

archive a predictable result of advantageously provides a finer level of detail that

enables the user to enable reports to be automatically scheduled and transmitted in

XBRL format, and capable of automatically link a current accounting system to an XBRL

document to generate an XBRL report; that have an efficient and automatic means to

analyze and manipulate data in an XBRL document- See Davis at Para 24.

Regarding **Claim 22**,

        Davis and Webber teach the method of claim 18 and further comprise:

                a user formula receiver; a new row or column creator coupled to

said user formula receiver and to said internal metadata grid organizer; a

new row or column user formula placer coupled to said new row or column

creator and to said user formula receiver.

(See Davis at Para 23, discloses XBRL is an XML-based language used for reporting

financials such as balance sheets report. Also Davis further disclosed the RDX

document editor 208 provides style sheet editing capabilities, for example, contain a set

of financial statements against which several style sheets could be applied: one to show

the data in annual columns, one to show it in a quarterly breakdown. Also Davis further

disclosed XBRL's period type [e.g. dimensional metadata, report with four, three-month

time periods (four quarters). The user may also use these parameters to specify any

duration for a period type], See Davis at Para [0116].)

Regarding **Claims 40-42**,

Davis and Webber teach the method of claims 1, 18 and 23 and further

comprise:

> **the internal metadata describes data, contained in the database,**
>
> **from which a report is to be generated; and the screen includes tools for**
>
> **designing the report.**

(At Fig. 2 item 207 and at Page 5 Para [0061-0067] → Davis disclosed this limitation, as

clearly indicated in the cited text [e.g., the RDX document viewer, which was read from

local storage item 203 of Fig. 2 as shown]. Also Davis further disclosed the RDL

supports translation of XBRL instance document data into RDL format for analysis in

RDL system 106. The RDL system, in turn, provides data browsing, data manipulation,

data viewing (for example, in the form of charts, spreadsheets [rows and column], etc.),

and a general user interface for RDL documents, See Davis at Para [0067].

It is noted that any citations to specific, pages, columns, lines, or figures in the

prior art references and any interpretation of the references should not be considered to

be limiting in any way. A reference is relevant for all it contains and may be relied upon

for all that it would have reasonably suggested to one having ordinary skill in the art.

See, MPEP 2123.

Response to Arguments

Applicant's arguments with respect to claims 1-21 have been considered but are

moot in view of the new ground(s) of rejection.

It is noted; Applicant's amendments necessitated the new ground(s) of rejection

presented in this Office action (see above for details).

Further, the examiner introduced the **Webber** reference to address the newly

amended portions (see above for details). In addition, it is noted the Examiner maintains

the **Davis** reference; since discloses the mapper for generating a relationship between

data from one or more sources and the one or more values to be placed within the

report (Para 27) which represented in a "Tree View for Reusable Data Markup

Language" (Fig. 9 and Para 104) wherein RDL system 106, which provides the

analytical processing capability of the system. RDX program elements 102 convert

XBRL information into RDL data objects for analysis by RDL system 106. Conduit 104

is a mechanism whereby RDL data objects are passed to the RDL system 106. Conduit

104 may include any communications mechanism (e.g., an internal memory copy, a

TCP/IP transfer across the Internet, or a fetch from a storage device such as a hard

disk) (Para 59). Davis further discloses XBRL is an XML-based language used for

reporting financials such as balance sheets, cash flow reports. XML is also known as

metadata. This interpretation is supported by the Applicant's Specification, which states.

"XBRL is based on the Extensible Markup Language (XML), and is specifically designed

for allow for improved identification and communication of the complex financial

information common in corporate business reports. With the rise of XBRL, it would be

valuable to allow users to map internal metadata to XBRL external metadata." See

Applicant's Specs at Para 23 and Para 4). Also Davis discloses in FIG. 2, RDX front end

202 (including RDX Parser 204 and RDX Manager 206) works with XBRL-formatted

data files that are stored locally or over a network or over the Internet, or in any

combination of sources (see item 304 of Fig. 3 XBRL document at the server externally

from Computer item 301). Generally, to be a valid XBRL document, the tagged file is

validated with the XBRL Document Type Definition ("DTD") and RDX system 100

supplements the DTD validation with optional semantic validation based on user-

defined rules. Also Davis's method allows RDL tagger 212 supports translation of XBRL

instance document data into RDL format for analysis in RDL system 106 and provides

data browsing, data manipulation, data viewing (for example, in the form of charts,

spreadsheets, etc.), and a general user interface for RDL documents-(See Para 87-90.)

Conclusion

Any inquiry concerning this communication or earlier communications from the

examiner should be directed to Quoc A. Tran whose telephone number is 571-272-

8664. The examiner can normally be reached on 9AM - 5PM EST.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's

supervisor, Doug Hutton can be reached on 571-272-4137. The fax phone number for

the organization where this application or proceeding is assigned is 571-273-8300.

Information regarding the status of an application may be obtained from the

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you have questions on access to the Private PAIR system, contact the Electronic

Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a

USPTO Customer Service Representative or access to the automated information

system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

/Quoc A, Tran/
Patent Examiner

/Doug Hutton/
Doug Hutton
Supervisory Primary Examiner
Technology Center 2100